Business Requirement Document (BRD)

Project Title

Sales Order Dashboard

Business Objective

The objective of this dashboard is to provide a consolidated view of sales performance across time, categories, regions, and payment modes to support data-driven business decisions.

Stakeholders

- Sales Manager
- Business Head
- Regional Sales Team
- Finance Team

Business Problems

- Lack of visibility into overall sales and profit performance
- Difficulty in tracking monthly sales trends
- No clear understanding of top-performing states and categories
- Limited insights into payment-mode preferences

Scope of Dashboard

- Time period: 2020 – 2025
- Analysis based on sales, profit, quantity, category, state, and payment mode

Key KPIs

- Total Revenue
- Total Profit
- Profit Margin (%)
- Total Quantity Sold

Dashboard Components & Requirements

1. KPI Summary Section

Purpose: Quick performance snapshot - Total Revenue (SUM Amount) - Total Profit (SUM Profit) - Profit Margin = Profit / Revenue - Total Quantity Sold

2. Sales Trend Over Time

Chart Type: Line Chart - X-axis: Month-Year - Y-axis: Sales Amount - Purpose: Identify seasonality and monthly performance trends

3. Monthly Sales by Category

Chart Type: Treemap - Dimensions: Category, Month - Measure: Sales Amount - Purpose: Compare category-wise monthly contribution

4. Top 5 States by Sales

Chart Type: Horizontal Bar Chart - Dimension: State (Top 5) - Measure: Sales Amount - Purpose: Identify highest revenue-generating states

5. Profit by Category & Sub-Category

Chart Type: Treemap - Dimensions: Category, Sub-Category - Measure: Profit - Purpose: Identify profitable and loss-making segments

6. Quantity vs Profit Analysis

Chart Type: Scatter Plot - X-axis: Quantity Sold - Y-axis: Profit - Purpose: Analyze relationship between volume and profitability

7. Payment-mode Analysis

Chart Type: Pie Chart - Dimension: Payment Mode - Measure: Sales Amount - Purpose: Understand customer payment preferences

Filters / Controls

- Year of Order Date
- Category
- State
- Payment Mode

Assumptions

- Data is clean and pre-processed
- Currency values are consistent across years
- One record represents one order transaction

Business Impact

- Helps management track performance at a glance

- Enables region and category-level strategy planning
- Identifies profitable segments and payment trends
- Supports faster and informed decision-making

Tools Used

- SQL: Data extraction and transformation
- Excel: Data validation
- Tableau: Dashboard visualization

Success Criteria

- Dashboard loads within acceptable time
- KPIs match source data
- Business users can derive insights without additional support

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Document Version: 1.0 **Prepared By:** Akash